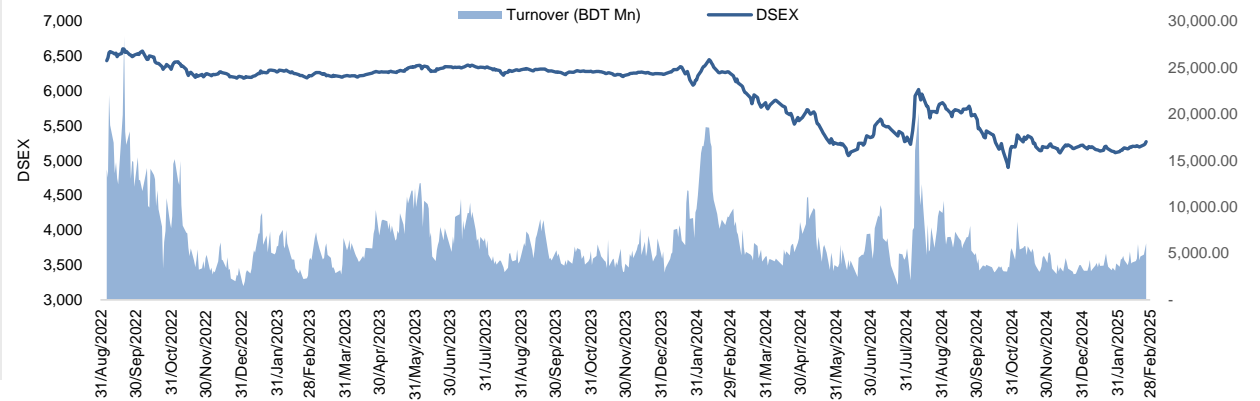


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.63%) gained 32.94 points and closed at 5,267.89. The blue-chip index DS30 (+0.20%), the Shariah-based index DSES (+0.59%), and the large-cap index CDSET (+0.51%) closed at 1,930.37, 1,176.05, and 1,061.08 points, respectively. Large-cap sectors posted mixed performance today. Bank booked the highest gain of 2.54%, followed by NBF1 (+1.26%), Food & Allied (+0.22%), Pharmaceutical (+0.14%), Fuel & Power (-0.06%), Telecommunication (-0.26%), and Engineering (-0.30%), respectively. Block trades contributed 2.7% of the overall market turnover. Grameenphone Ltd. (-0.2%) was the most traded share with a turnover of BDT 213 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,267.89	5,234.95	+32.94	+0.63%	+1.0%
DS30	1,930.37	1,926.50	+3.87	+0.20%	-0.5%
DSES	1,176.05	1,169.10	+6.94	+0.59%	+0.6%
CDSET	1,061.08	1,055.67	+5.41	+0.51%	-0.5%

	Advanced	Declined	Unchanged	Total
All Category	196	156	44	396
A Category (Equity)	123	71	24	218
B Category (Equity)	30	43	6	79
N Category (Equity)	0	0	0	0
Z Category (Equity)	43	42	14	99
Mutual Funds	13	10	14	37
Corporate Bonds	2	1	0	3
Treasury Bonds	0	0	0	0

	Today	Last Day	Daily %Δ
Mcap			
Mn BDT	6,979,335	6,965,304	+0.2%
Mn USD	57,208	57,093	
Turnover			
Mn BDT	6,072	5,443	+11.6%
Mn USD	50	45	
Volume			
Mn Shares	277	232	+19.0%
No. of Trade	180,277	166,758	+8.1%

* Average Interbank Exchange Rate is BDT 122.00 as of Feb 25, 2025

Fahim Hassan Research Analyst (880) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (880) 1708805202 mistiaz.uddin@bracepl.com
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Figure: Sectorial Turnover (BDT Mn)

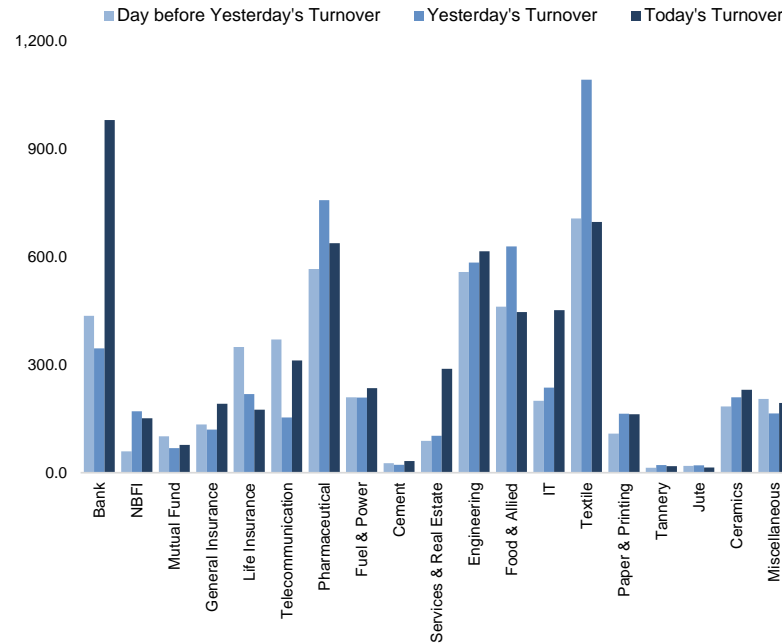
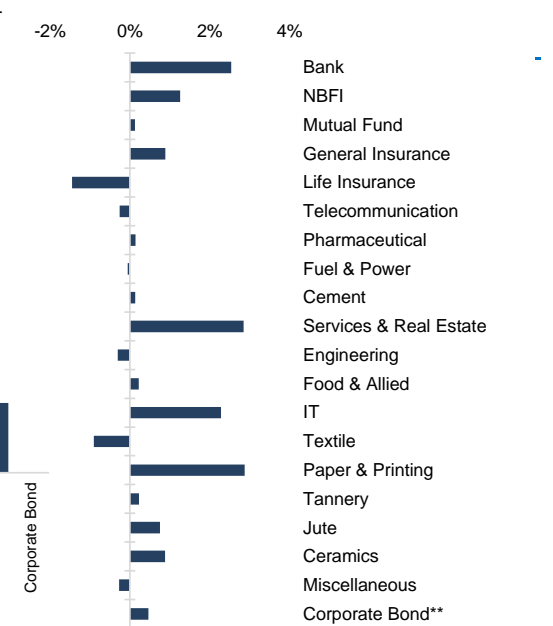


Figure: Sectorial Mcap Change



Market PE 15.1x
Market PB 1.2x

* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,471	1,434	+36.41	+2.54%	36	695,897	10.0%	979.1	16.6%	9.0x	0.7x	GP	464,638	12.8%	213.5	12.8x	7.2x
NBFI	1,109	1,095	+13.79	+1.26%	23	105,673	1.5%	151.0	2.6%	NM	NM	SQURPHARMA	191,473	5.3%	55.5	8.6x	1.5x
Mutual Fund	583	582	+0.75	+0.13%	37	26,777	0.4%	77.5	1.3%	NM	0.5x	BATBC	187,218	5.2%	77.2	10.7x	3.2x
General Insurance	2,638	2,615	+23.15	+0.89%	43	75,307	1.1%	191.9	3.2%	13.4x	1.1x	ROBI	150,852	4.2%	72.1	21.5x	2.2x
Life Insurance	1,790	1,816	-26.36	-1.45%	15	47,595	0.7%	175.4	3.0%	NM	NM	WALTONHIL	143,134	4.0%	8.8	10.8x	1.3x
Telecommunication	5,454	5,468	-14.00	-0.26%	3	639,563	9.2%	311.5	5.3%	14.3x	4.3x	BEXIMCO	103,850	2.9%	0.0	NM	1.3x
Pharmaceutical	2,889	2,885	+4.07	+0.14%	34	547,747	7.8%	637.3	10.8%	13.2x	1.5x	BRACBANK	94,503	2.6%	107.2	8.5x	1.3x
Fuel & Power	1,106	1,106	-0.62	-0.06%	23	292,853	4.2%	235.1	4.0%	16.6x	0.6x	BERGERPBL	83,425	2.3%	0.3	24.3x	5.8x
Cement	1,848	1,846	+2.48	+0.13%	7	88,087	1.3%	32.1	0.5%	16.9x	1.9x	ISLAMIBANK	75,831	2.1%	77.5	16.2x	1.0x
Services & Real Estate	1,045	1,016	+28.97	+2.85%	9	57,455	0.8%	288.6	4.9%	20.4x	0.4x	MARICO	75,263	2.1%	19.3	13.4x	9.9x
Engineering	2,504	2,511	-7.65	-0.30%	42	282,430	4.0%	615.1	10.4%	12.8x	0.9x	RENATA	59,011	1.6%	4.9	19.9x	1.7x
Food & Allied	16,471	16,434	+36.96	+0.22%	21	301,376	4.3%	445.9	7.5%	16.4x	4.5x	LHB	58,069	1.6%	11.6	14.4x	2.9x
IT	2,076	2,030	+46.35	+2.28%	11	27,388	0.4%	451.3	7.6%	21.3x	1.7x	UNILEVERCL	48,685	1.3%	0.2	66.2x	20.7x
Textile	1,183	1,193	-10.78	-0.90%	58	123,161	1.8%	696.2	11.8%	74.0x	0.8x	ICB	45,965	1.3%	22.8	36.3x	1.1x
Paper & Printing	4,464	4,340	+124.77	+2.87%	6	20,170	0.3%	162.0	2.7%	NM	0.9x	DUTCHBANGL	45,699	1.3%	6.0	7.3x	0.9x
Tannery	1,948	1,944	+4.40	+0.23%	6	21,704	0.3%	18.3	0.3%	NM	1.6x	BXPHERMA	35,644	1.0%	73.4	5.6x	0.7x
Jute	12,420	12,327	+92.99	+0.75%	3	2,734	0.0%	14.6	0.2%	NM	NM	EBL	35,447	1.0%	3.0	5.4x	0.8x
Ceramics	409	405	+3.57	+0.88%	5	18,328	0.3%	230.4	3.9%	NM	1.1x	PUBALIBANK	33,895	0.9%	9.4	3.5x	0.6x
Miscellaneous	4,261	4,272	-11.59	-0.27%	15	231,375	3.3%	193.4	3.3%	94.7x	1.9x	POWERGRID	32,532	0.9%	4.5	NM	0.3x
Corporate Bond**	15,284	15,213	+71.00	+0.47%	16	33,475	0.5%	0.1	0.0%	NM	NM	CITYBANK	31,236	0.9%	71.6	4.4x	0.8x
Treasury Bond**	1,367	1,337	+30.68	+2.30%	235	3,339,768	47.9%	0.0	0.0%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
BPML	34.4	+9.9%	10.4	NM	0.5x
SEAPEARL	35.7	+9.8%	94.6	NM	2.1x
SAFKOSPINN	11.3	+9.7%	3.5	NM	NM
ARAMITCEM	13.7	+9.6%	2.6	NM	NM
AB BANK	8.0	+9.6%	54.5	12.7x	0.3x
SIBL	10.3	+9.57%	24.5	9.0x	0.5x
ISLAMIBANK	47.1	+9.0%	77.5	16.2x	1x
IFIC	7.3	+9.0%	76.0	5.8x	0.4x
FIRSTSBANK	5.2	+8.3%	17.7	2.8x	0.3x
UCB	9.9	+7.6%	18.9	4.7x	0.3x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	108,958	7.7%	8.6x	1.5x
ISLAMIBANK	74,730	5.3%	16.2x	1.0x
BEXIMCO	69,463	4.9%	NM	1.3x
BATBC	50,233	3.6%	10.7x	3.2x
WALTONHIL	46,773	3.3%	10.8x	1.3x
BRACBANK	46,489	3.3%	8.5x	1.3x
GP	44,708	3.2%	12.8x	7.2x
RENATA	32,968	2.3%	19.9x	1.7x
BXPHERMA	23,409	1.7%	5.6x	0.7x
PUBALIBANK	22,905	1.6%	3.5x	0.6x
CITYBANK	21,020	1.5%	4.4x	0.8x
LHB	20,953	1.5%	14.4x	2.9x
OLYMPIC	20,496	1.5%	15.9x	2.5x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
GP	344.1	-0.2%	213.5	12.8x	7.2x
AGNISYSL	28.9	+3.2%	212.2	19.4x	1.6x
SPCERAMICS	18.2	+3.4%	145.2	NM	0.6x
BRACBANK	53.4	-	107.2	8.5x	1.3x
BESTHLDNG	19.1	+3.8%	100.1	22.9x	0.4x
ORIONINFU	379.5	-1.4%	95.7	NM	24.8x
SEAPEARL	35.7	+9.8%	94.6	NM	2.1x
NRBBANK	13.9	+2.2%	84.4	22.9x	1.1x
RDFOOD	27.0	+2.3%	84.2	30.0x	1.6x
ISLAMIBANK	47.1	+9.0%	77.5	16.2x	1.0x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
KPPL	22.5	-8.2%	48.7	NM	NM
ZAHEENSPIN	8.1	-6.9%	14.1	NM	2x
NEWLINE	10.6	-5.4%	20.7	NM	0.4x
BARKAPOWEE	10.4	-4.6%	13.1	24.8x	0.5x
DELTASPINN	6.7	-4.3%	8.9	NM	0.5x
MIRACLEIND	31.4	-4.0%	9.1	NM	1.7x
MHSMML	15.3	-3.8%	7.2	20.1x	0.8x
ETL	10.4	-3.7%	34.1	45.1x	0.8x
FUWANGFOOD	16.3	-3.6%	73.5	NM	7.8x
BPPL	11.2	-3.4%	10.7	NM	0.4x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
ALARABANK	18.5	18.5	2.0	1,701	31.47
STANDBANKL	5.4	5.4	1.0	3,856	20.82
AMBEEPHEA	690.0	690.0	1.0	25	17.16
JAMUNABANK	21.2	21.2	1.0	750	15.90
DHAKABANK	10.1	10.1	1.0	1,060	10.71
BEACHHATCH	108.8	102.0	7.0	96	9.97
LOVELLO	80.5	80.5	1.0	100	8.05
MERCANBANK	9.0	9.0	1.0	648	5.83
KBPPWBIL	167.0	165.1	2.0	33	5.44
BXPHERMA	82.0	82.0	3.0	62	5.08

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond Index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
ALARABANK	18.5	18.5	31.5	1,701	2
STANDBANKL	5.4	5.4	20.8	3,856	1
AMBEEPHA	690.0	690.0	17.2	25	1
JAMUNABANK	21.2	21.2	15.9	750	1
DHAKABANK	10.1	10.1	10.7	1,060	1
BEACHHATCH	108.8	102.0	10.0	96	7
LOVELLO	80.5	80.5	8.1	100	1
MERCANBANK	9.0	9.0	5.8	648	1
KBPPWBIL	167.0	165.1	5.4	33	2
BXPHARMA	82.0	82.0	5.1	62	3
ACI	155.8	155.8	4.4	28	3
MARICO	2,386.9	2,386.9	3.9	2	1
PRIMELIFE	30.6	30.6	3.1	102	2
WALTONHIL	500.0	500.0	3.0	6	1
ORIONINFU	390.0	390.0	2.4	6	1
GPHISPAT	23.3	23.3	2.3	100	1
NAVANACNG	23.2	23.2	2.3	100	1
BBSCABLES	20.1	20.1	2.0	100	1
AMANFEED	27.9	27.9	1.3	45	1
PADMALIFE	20.8	20.8	1.0	50	1
CVOPRL	137.5	137.5	1.0	7	1
PRIMEINSUR	29.2	29.2	1.0	33	1
Total			165.2		45

Important DSE News
BATBC

The company has informed that the Board of Directors of the company in its meeting dated 24th February 2025 approved the investment of BDT 24.90 crore for purchasing & installing laser jet printer in 36 SMD packing lines in both Dhaka & Savar factory. The investment will be funded from internal sources and bank financing based on the cash flow of the Company. The details are as follows: Printer cost: BDT 14.55 crore, Printer installation cost: BDT 10.35 crore and Total Estimated Cost: BDT 24.90 crore.

SINGERBD

The company has informed that the Bangladesh Economic Zones Authority (BEZA) has approved the Commercial Operation Approval of Singer Bangladesh Limited-Home Appliances Plant located at the Bangladesh Special Economic Zone (BEZA) at Arahazar, Narayanganj on February 24, 2025.

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
GP		0.0%	170.0%	Record Date	26-Feb-25
BATBC		0.0%	150.0%	Record Date	26-Feb-25
SIPLC		0.0%	15.0%	Record Date	27-Feb-25
CITYGENINS		0.0%	10.0%	Record Date	27-Feb-25
CRYSTALINS		0.0%	12.0%	Record Date	2-Mar-25
RELIANCINS		0.0%	30.0%	Record Date	3-Mar-25
GREENDELTA		0.0%	25.0%	Record Date	4-Mar-25
SUMITPOWER		0.0%	10.0%	Record Date	10-Mar-25
ROBI		0.0%	15.0%	Record Date	16-Mar-25

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